

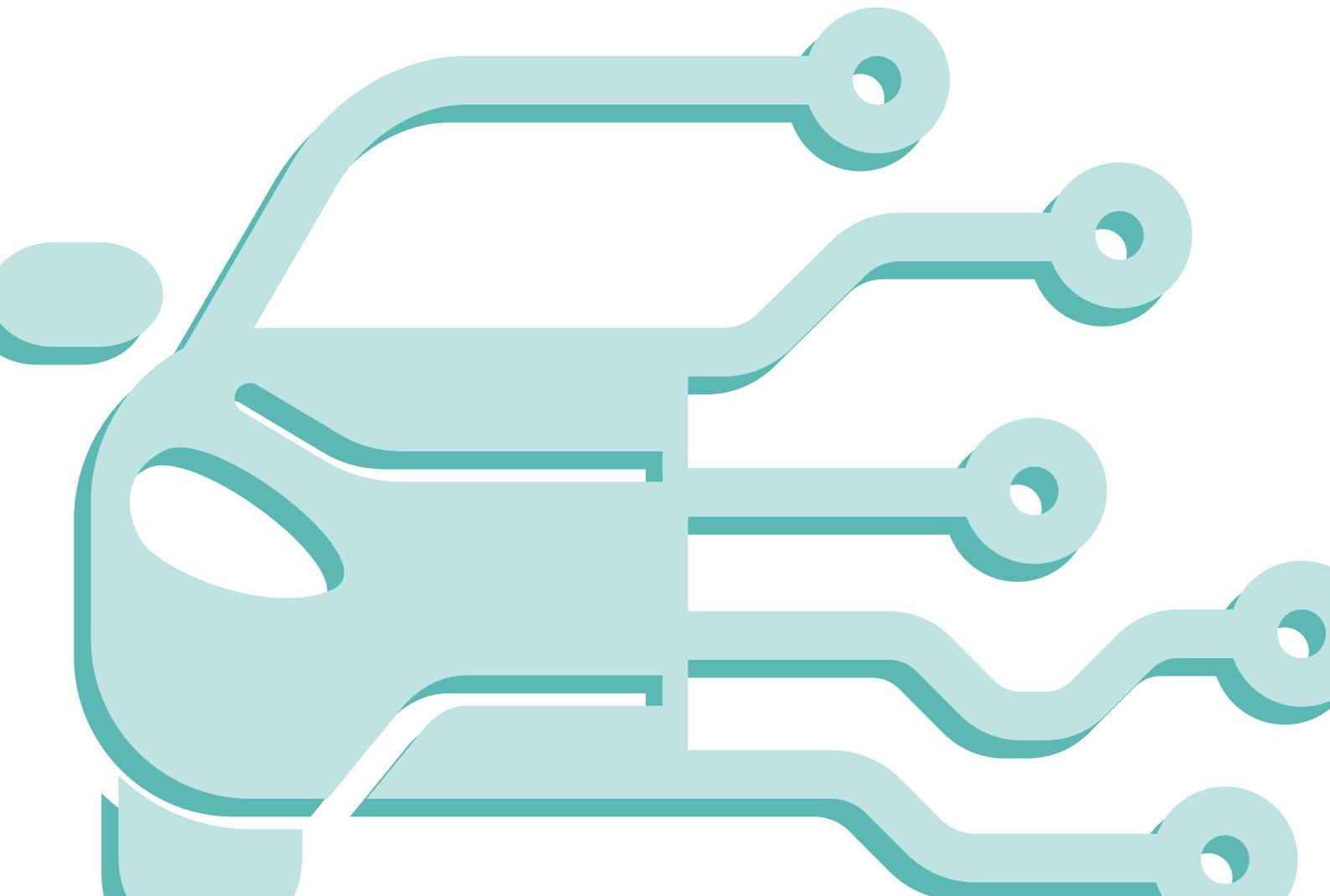


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THE ADECCO GROUP

# Future of Talent in the Automotive & Mobility Industry

Talent implications &  
driving transformation





**“As automotive and mobility companies begin re-calibrating their roadmaps for a new technologically-fueled future, finding the right partner for their talent needs will be crucial.”**

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# Foreword

**Faris Becirovic, SVP & Global Industry Lead Mobility,  
the Adecco Group**

Workforces and workplaces are constantly evolving in response to advances in technologies. COVID-19 has accelerated this pace of change.

On the one hand, the pandemic will motivate organisations to adopt a raft of risk mitigation measures to protect themselves from similar shocks in the future, on the other hand, it will push them to capitalise on emergent growth opportunities. This, in turn, will have implications for talent management strategies.

As the industry adapts to the new normal shaped by the COVID-19 crisis, human-machine interactions are set to surge. Meanwhile, innovative technologies will redefine work practices.

Consequently, rethinking talent acquisition, retention and management has become an urgent imperative for organisations. Major elements across supply chains, manufacturing processes and operational systems now require up-skilling, re-skilling and cross-skilling in order to strengthen overall organisational agility.

**“ As uncertainties deepen, companies will look to partner with experienced talent management providers, drawing on their pool of domain specialists and skilled professionals. ”**

The automotive and new mobility industry is in a period of profound transformation. Technology-driven disruption is reshaping the fundamental tenets of vehicle design, value creation, competitive positioning, customer engagement, and revenue generation. In the process, it is compelling the automotive industry to revisit traditional business models and organisational structures.

**“ While automotive manufacturers gear-up to prepare for, and evolve with, this new era marked by dramatic technological change, a core area of focus will be to bridge the technology-talent gap. ”**

Today, the automotive industry is working overtime to realign with advances in the Internet of Things (IoT), vehicle-to-vehicle communication and vehicle-to-infra communication. The buzz is all about digital and cognitive skills as workforces increasingly interact with artificial intelligence, data analytics, machine learning, automated, connected, and autonomous technologies.

As automotive and mobility companies begin re-calibrating their roadmaps for a new technologically-fueled future, finding the right partner for their talent needs will be crucial.

# Executive Summary

The automotive industry, already in the grip of massive technology-fuelled disruption, has found itself further transformed under the impact of COVID-19. This white paper presents an in-depth examination of the impact and implications of technology and the COVID-19 pandemic on the automotive and mobility industry, and the critical importance of selecting optimal talent and change management strategies.

## Changing market dynamics

The automotive and mobility industry has plunged headlong into a new normal, with no pre-existing templates on how to engage with such dynamic change.

As the industry begins to reinvent itself, its central concerns, as always, will be to respond to evolving customer expectations and maintain sustainable growth.

Innovation is emerging as the barometer of success. And, as the pandemic recasts traditional rules of engagement, success is also predicated on the ability of automotive and mobility companies to respond effectively to the crisis, recover from related setbacks, and thrive in its aftermath.

## Compelling need for change as the industry adapts to advancing technology

Against this backdrop, it is becoming increasingly clear that technology will catalyse fundamental change across the entire value chain of the automotive industry. *Connected, Autonomous, Shared and Electric (CASE) technologies* have already upended everything from car design to development, and from competitive strategies to sales and marketing approaches.

While the industry adapts to the six pillars of digital transformation – *Digital retailing, Mobility-as-a-Service, Connected and autonomous cars, Industry 4.0, Connected supply chain and Digital enterprise* – these evolving trends are creating new growth opportunities, challenges, business models, competitors, and redefining attitudes towards products, personnel, processes and performance.

## Talent: Driving transformation

With an eye on the future, major global automakers are already focused on functioning in ways that are lean, flexible, innovative and collaborative. One of the most significant enabling factors in this context will be talent.

Intensifying digitalisation in the automotive and mobility industry has underlined the constant need for, and importance of, technical expertise, change management, up-skilling, re-skilling and career transformation support within organisations. Invariably, the technological transformation of the industry will impact talent acquisition and management strategies of its stakeholders.



# COVID-19's impact on the Automotive & Mobility industry

The COVID-19 pandemic has intensified ongoing uncertainties in the mobility industry. Lockdowns, plant closures, labour shortages, and demand-supply shocks are redefining the new normal, creating an extremely volatile business ecosystem. As stakeholders launch their post-pandemic comeback, a key concern will be change and talent management. The pandemic has created unprecedented opportunities for disruptive growth but leveraging them will require the right talent with the right skill-sets, the right organisational structure with the right tools, and the right leadership with the right strategies to drive through transformational change.

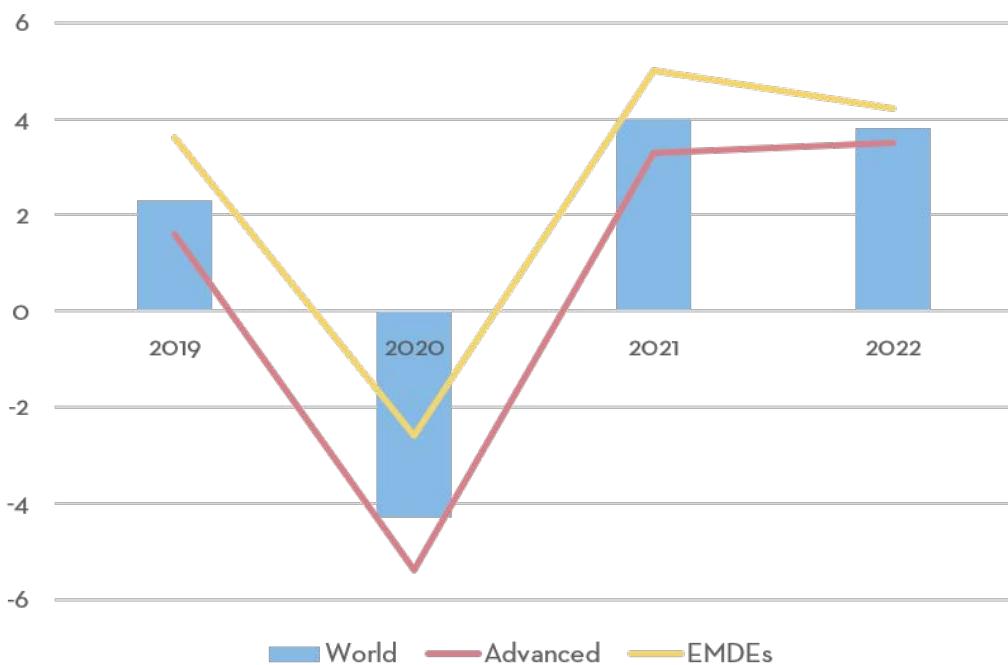


Global GDP dropped to -4.3% by the end of 2020; Sharp spike expected in 2021 as industries gradually adapt to the *new normal* of doing business

The World Bank indicates that Global GDP dropped to as low as -4.3% by the end of 2020, with subdued recovery projected in 2022 and remaining more than 5% below pre-pandemic projections.

As industries gradually reopen with the loosening of restrictions across the globe, a 4% increase in global economic output is expected in 2021. This trend is observed more so on account of the base effect in data, as opposed to an indication of robust growth in an economy.

**Figure 1: COVID-19 Impact on World GDP Growth, 2019-2021**



Source: World Bank.

Note: EMDEs = emerging market and developing economies. Shaded area indicates forecasts. Data for 2020 are estimates. Aggregate growth rates calculated using GDP weights at 2010 prices and market exchange rates.

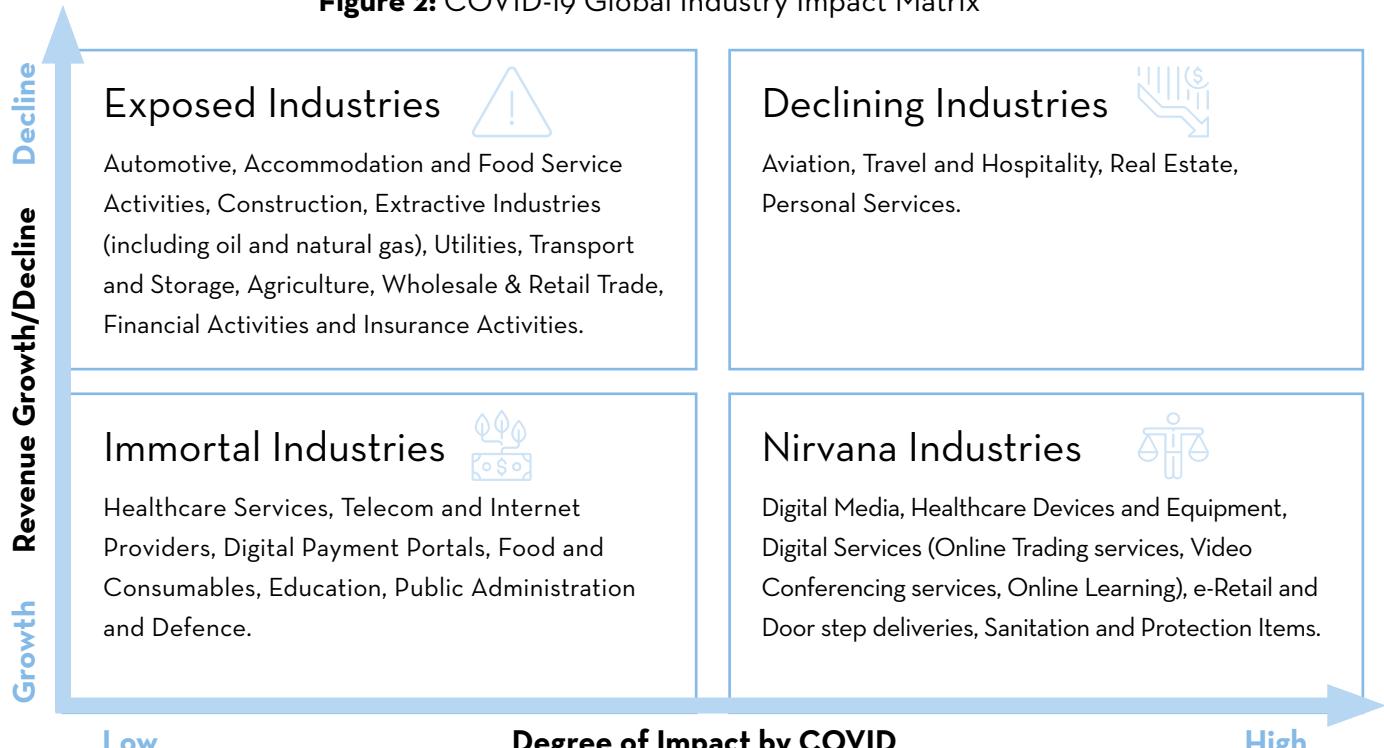
One of the biggest impacts of this crisis has been felt in the way people interact with each other and conduct business. Work environments are rapidly transforming to accommodate the new normal created by the pandemic, and with minimised physical interactions resulting from social distancing imperatives, this has had direct implications for manufacturing outlets that depend heavily on labour productivity. As a result, COVID-19 is poised to reshape the future of business practices and, indeed, the entire business ecosystem.

**The below impact matrix follows the current trends informing the *new normal* on the prospects of a range of key industries:**

Exposed Industries		Industries / sectors that will be most severely affected by the COVID-19 crisis register a sharp 20-30% decline in growth at the peak of the crisis and will post a slow recovery in the post-pandemic period.
Declining Industries		Industries / sectors that will be hit by close to 50% decline during the crisis phase and will eke out a late and very slow recovery in the post-pandemic era.
Nirvana Industries		Industry / sector models that will see exponential growth during the COVID-19 crisis and will continue to strengthen and sustain growth in the post-pandemic period.
Immortal Industries		Resilient technologies / business models that will remain relatively insulated from the impact of the COVID-19 outbreak, registering high revenue growth both during and after the pandemic.

Source: Frost & Sullivan

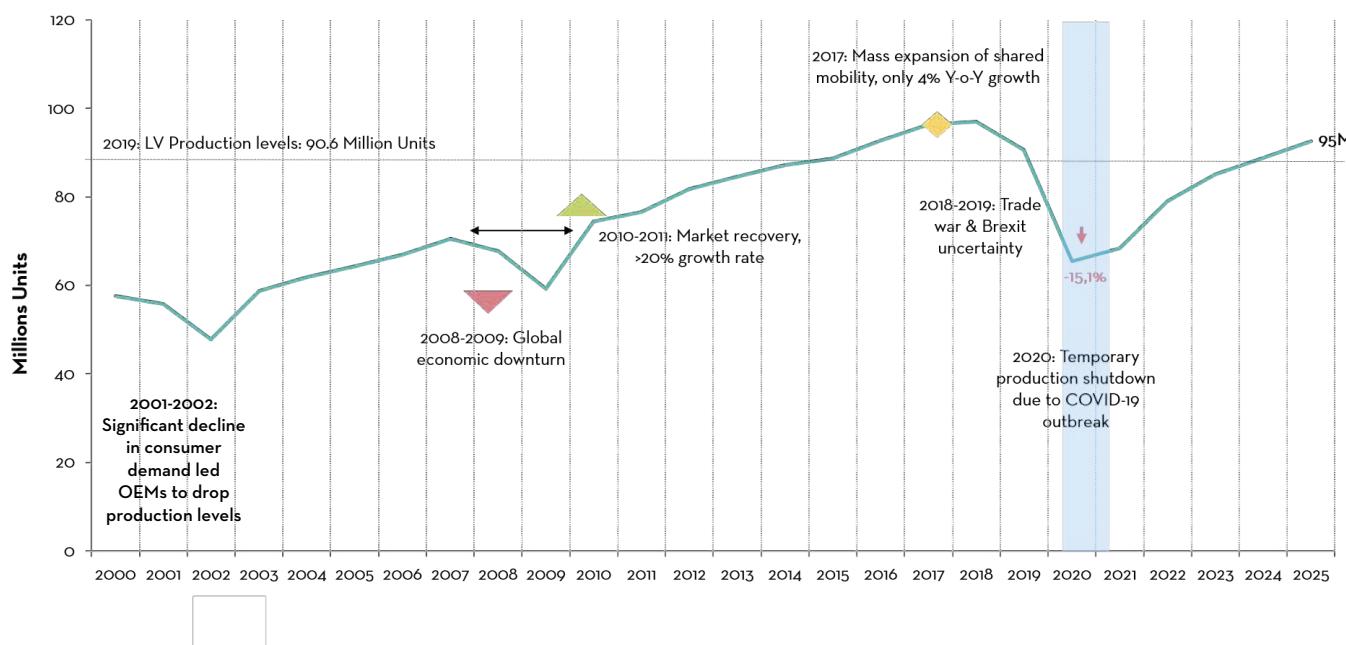
**Figure 2: COVID-19 Global Industry Impact Matrix**



Source: Frost & Sullivan

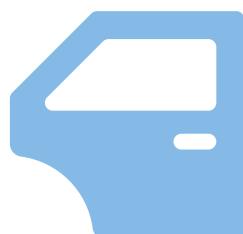
From the chart below, it is clear that the automotive industry has been hard-hit by the COVID-19 outbreak. Lockdowns have impacted the industry both directly in terms of plant closures and increased lead times, and indirectly in terms of labour shortages and logistics disruptions. Frost & Sullivan projects that a gradual rebound from the lows of 2020 is expected with pre-COVID levels being reached in 2023.

**Figure 3: Global LV Sales likely to Overtake 2019 Levels by 2023**

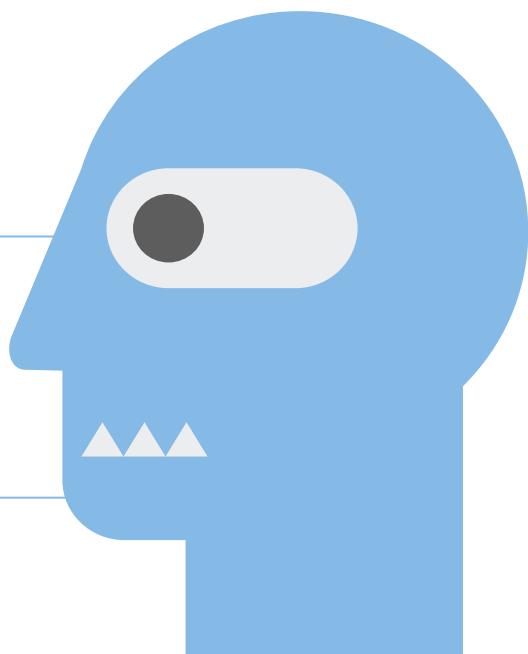


**Note:** Light Vehicles include Passenger Vehicles and Light Commercial Vehicles with GVWR of up to 7.5 MT

Source: Frost & Sullivan

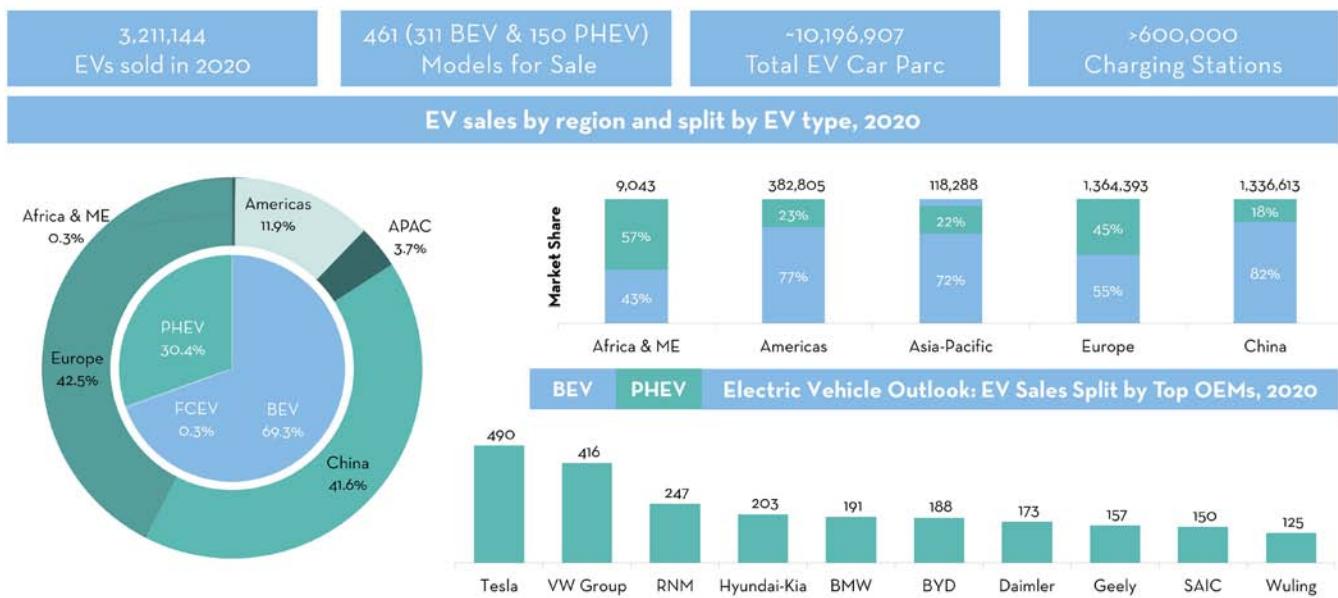


Annual light vehicle production volumes are anticipated to drop by about 21% from 2019 levels, before gathering pace to surpass these levels by 2022-2023 and reach close to 100 million units by the end of 2025.



Promisingly for the automotive industry, the robust performance of electric vehicles (EVs) is compensating for the fall in light vehicle sales. Frost & Sullivan projects that over 4.1 million EVs are likely to be sold in 2021, with Europe accounting for 43.4% total sales. Furthermore, 4 out of the top 10 OEMs will be European, with PSA making it on the list.

**Figure 4: Global EV Market Outlook 2021**



**Note:** APAC excludes China as it is represented separately

**Note:** Sales of December 2019 is estimated

Source: Frost & Sullivan

# Future-proofing the Automotive & Mobility workforce

Even as the automotive industry gears itself to a new business ecosystem, fast-paced changes have made it incumbent to be better prepared to strategise, develop and implement the talent practices necessary to maintaining competitive advantage. The pandemic has accentuated the need for fluidity and innovative ideas to enhance capability, capacity and agility from all sources of talent in an organisation. As companies resume operations, bolstering this talent supply chain is crucial. And while preparing for the leap in advancements with respect to technology adoption, organisational focus is therefore moving towards workforce motivation and HR preparedness.

## Talent expertise

Partnering with experts in workforce solutions to navigate evolving work patterns

## Innovation leadership

Increase talent sources through continuous learning (up-/re-skilling) to fast-track innovation and meet future needs

## Just-in-time talent

Quick and efficient access to capabilities and skills if the company loses critical talent

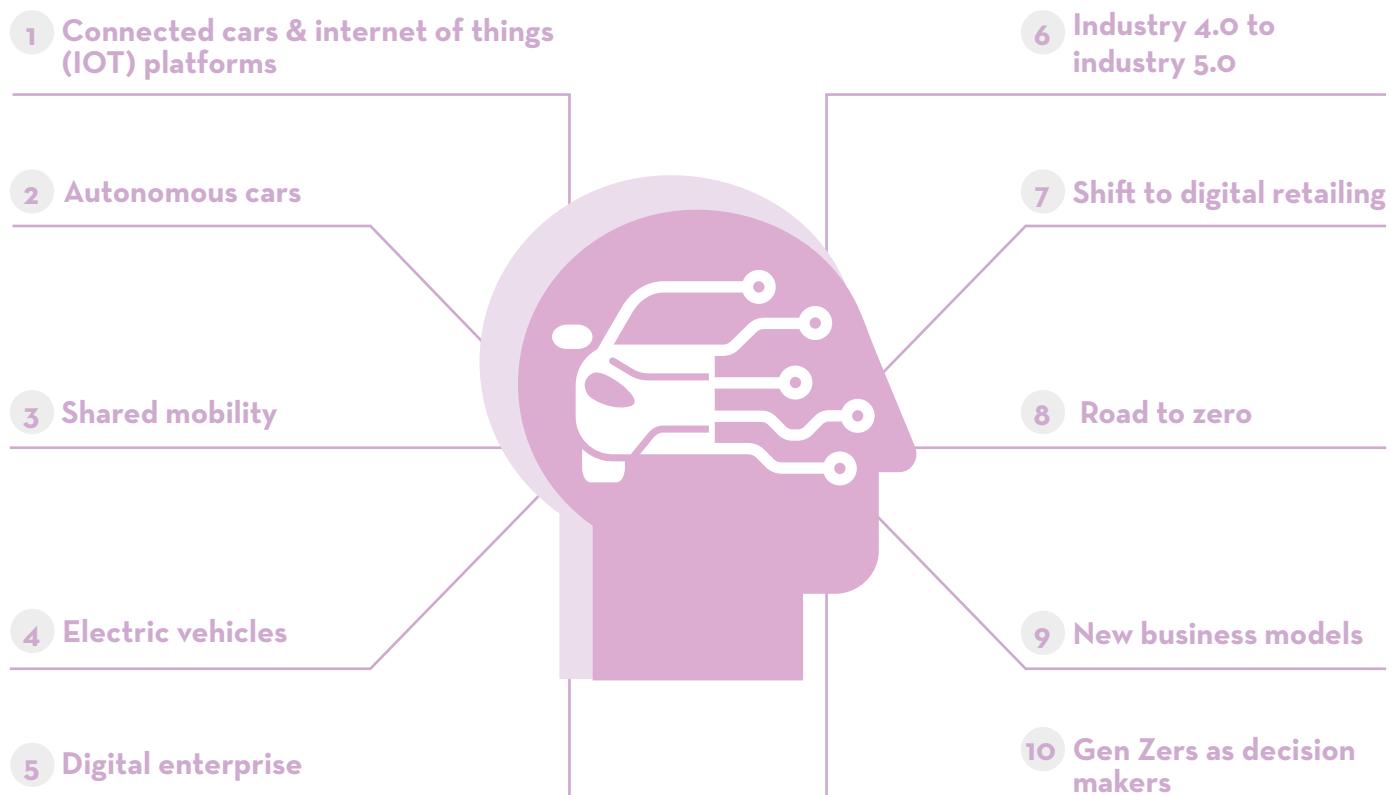
## Prioritising skills

Tech & Digital Engineering skill-sets and mindsets needed to continue to operate, grow and thrive during disruption

# 10 trends in the Automotive & Mobility industry

The COVID-19 pandemic has intensified ongoing uncertainties with respect to plant closures, labour shortages, logistics disruptions and accelerated focus on digitalisation in the automotive and mobility industry. As the industry reinvents itself in response to widespread changes, each variation will exert its own specific imprint on Talent Management – yielding new strategies, approaches and paradigms.

Among the multiple growth opportunities arising in the automotive and mobility space, the Adecco Group has filtered out 10 trends that will shape the industry's trajectory. These trends, disruptive in nature, will usher in a slew of changes; not just in the automotive sector, but equally in the Talent Management industry.



## Trend 1: Connected cars & Internet of Things (IoT) platforms

Automotive OEMs plan to offer more than 100 in-vehicle digital services, including 20-30 new services built around predictive analytics, Health, Wellness and Well-being (HWW), connected living, Internet of Things (IoT) and Information Technology Services by 2025.

The automotive industry is ramping up investments on the in-house development of IoT platforms in order to benefit directly from related monetisation opportunities. All OEMs are expected to launch IoT platforms in the future.

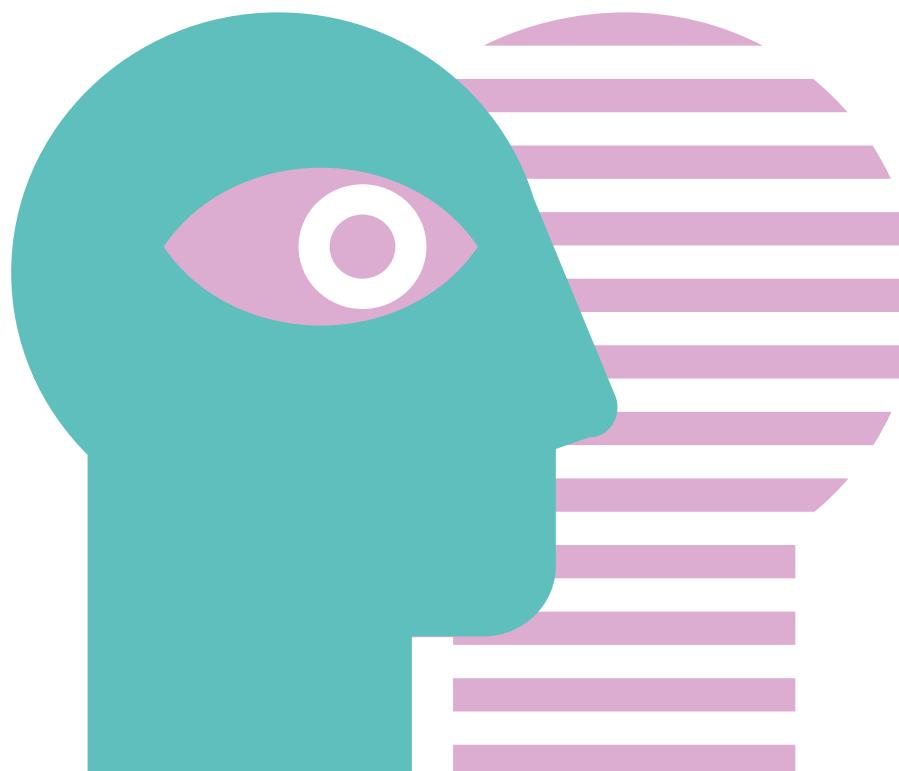
These new IoT platforms will kick-start the next generation of vehicle services, while requiring the development of completely new electric / electronic architectures with the capacity to support Software Over-the-Air (SOTA) updates, covering 15 bundles of marketplace services and extreme personalisation. As this happens, a unified software platform approach across brands will be crucial to developing and deploying a connected ecosystem, similar to Volkswagen's "vw.OS".

## IMPACT ON TALENT MANAGEMENT

This new focus area for traditional automakers will place greater emphasis on recruiting network engineers, electronic engineers and software engineers as part of the core R&D team.

The earlier trend of outsourcing software development is gradually being replaced by OEMs trying to develop their own specific platform architectures and building long-term features around them.

Such competencies require frequent up-/re-skilling of resources to ensure alignment with the latest technological advancements.



## Trend 2: Autonomous cars

It is estimated around 18 million highly autonomous vehicles (AVs) will become operational globally by 2030. This will include L3 AVs where pre-set conditions will define driving operations, and more advanced L4 and L5 AVs that will function with unconditional operating parameters. About eight million L4 vehicles in shared mobility will drive new business models in AV mobility. All major OEMs will target a specific share of L3s and L4s in their product portfolio. This will lead to OEMs and service providers offering related autonomous driving services (ADS), with ADS set to generate over USD 200 billion in revenues by 2030.

**“With AVs and ADS set for take-off, leading OEMs are set to earmark substantial funds to build strong research teams for self-driving cars and create impactful branding campaigns. ”**

## IMPACT ON TALENT MANAGEMENT



Autonomous Vehicle technology will require skill-sets in machine learning, computer vision, sensor processing and fusion, along with competencies in designing the 'guiding intelligence' of autonomous vehicles. Such know-how can be acquired either by hiring new engineers or by training existing engineers in these technical advances.

Most OEMs will turn to digital learning platforms focused on machine learning, IoT, computer vision and autonomous engineering to supplement their R&D efforts. An alternate solution to accelerating the growth curve involves outsourcing such initiatives to an expert with an established track record of implementing solutions for global clients and shifting to a Centre of Excellence (CoE) model focused on technical development.

**Figure 9:** Top 12 new revenue streams for OEMs & Service Providers in Autonomous Driving Services

### Vehicle Services

- Build, Own, Operate, Maintain (Boom)
- Parking services
- On-demand feature updates



### Logistics Services

- Hub-hub goods delivery
- Refuse & recovery
- Curbside delivery



### Mobility Services

- Autonomous taxis
- Autonomous shuttles
- Autonomous mono pods



### Peripheral Services

- On-demand / user insurance
- Vehicle data services
- Predictive / auto maintenance



### Trend 3: Shared mobility

Revenues from shared and new mobility solutions such as car sharing, rental & leasing, Demand Responsive Transit services and ride hailing are expected to double to reach USD 2 trillion by 2030 (factoring in slight disruption to this growth trend during the pandemic). Revenue expansion will be accompanied by the emergence of companies with USD 100 billion+ valuations. Vehicle sharing is already a game-changer in most economies and is slated to rebound once the COVID-19 crisis abates – albeit in a new, modified avatar.

New mobility companies are agile, flexible and uninterested in managing assets. Instead, they are focusing on partnerships and short-term contracts that go beyond mobility services such as providing fleet balancing, vehicle repair, fleet management, in-fleet fuel management, and electric fleet charging. This ambition is slated to create a new field of services sharing among different companies offering similar services.



### IMPACT ON TALENT MANAGEMENT

Changes in the shared mobility space will generate an array of emerging work profiles, ranging from car repair technicians and gig drivers, to personnel for vehicle refuelling / recharging.

When outsourcing field activities, mobility service providers will turn to companies with proven capabilities in workforce management and in-field training.

Managing such changes in the shared mobility space will further highlight the strong need for skills training and support (across technical, digital and leadership spheres) among entrepreneurs of the future.

“ Bike sharing, fleet repurposing and MaaS expected to see quick recovery during the pandemic. ”

#### Bike sharing to increase in the short-term



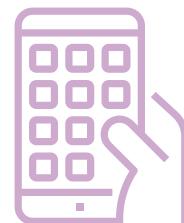
#### Fleets to be repurposed to maximise asset utilisation



#### Single occupancy mobility modes to make rapid recovery



#### Evolution from single shared mobility apps to mega apps



## Trend 4: Electric vehicles

Based on different scenarios, it is estimated that 25% to 35% of all cars sold by 2025 will be hybrids, plug-ins or fully electric vehicles (EVs).

Similar to VW Group's new MEB platform, other leading OEMs are expected to invest in new dedicated skateboard EV platforms and architectures. This will require huge investments in advanced driver assistance technologies and resources.

Around 13 global OEM brands are expected to launch battery EVs (BEVs) on skateboard platforms.

“Companies to scale-up investment in dedicated skateboard EV platforms and architectures, leading to collaborations in the industry.”

## IMPACT ON TALENT MANAGEMENT



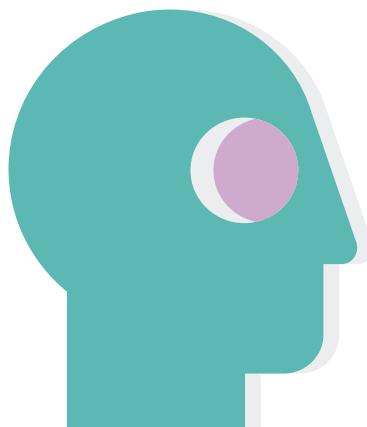
Building new platform architectures to support advanced driving technologies will require more neural network engineers, material scientists, software specialists, app developers for infotainment systems, cyber security specialists, radar, LiDAR and communications specialists.

Moreover, there will also be a need for new service teams with deep knowledge of EV charging, repair and maintenance.

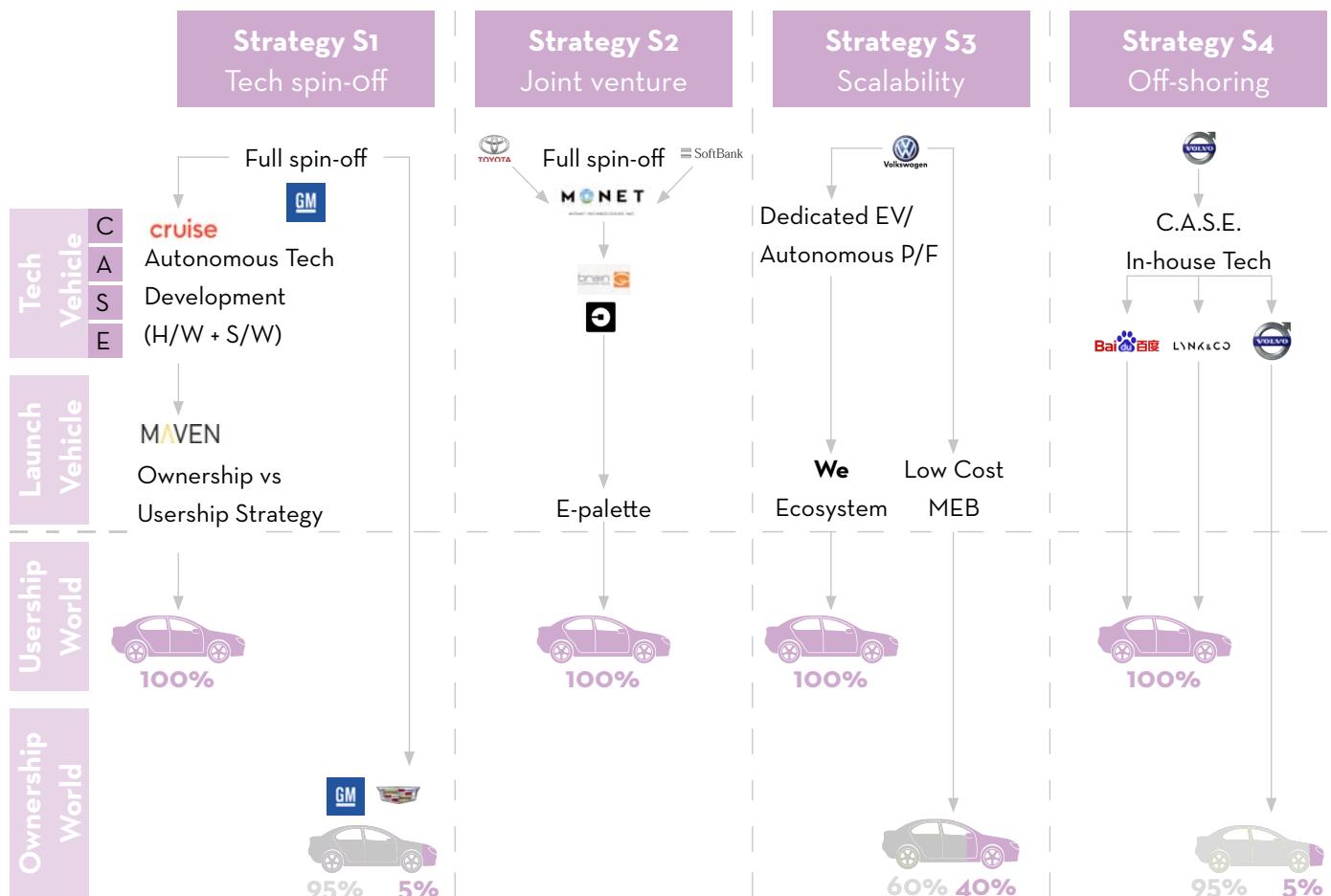
Similarly, sales and manufacturing teams will transform in adaptation to emerging vehicle technologies. Due to EV development initiatives being widely dispersed, teams collaborating on such initiatives also tend to be geographically dispersed.

Outsourcing platform development to recognised experts will enable OEMs to accelerate R&D efforts and speed up time-to-market. Aligning with outside service providers in terms of quick charging, mobile charging and other EV support infrastructures will allow automotive companies to focus their resources on their core competencies.

The change in vehicle technology will further drive a shift towards more advanced manufacturing technologies. Evolving processes will require significant investment in Industry 4.0 and new digital skill-sets in advanced manufacturing.



**Figure 10:** Business Models on EV Platform / Architectures Strategy



## Trend 5: Digital enterprise

Owing to growing digitisation and advancements in technology, the global automotive industry is expected to invest a significant amount in digital transformation initiatives.

Over 2,100 new digital start-ups are expected to disrupt the automotive industry's supply chain.

Connected supply chains, digital manufacturing, digital retail, connected services and maintenance, and data monetisation are some of the key aspects of the digital enterprise that are gaining high penetration in the automotive industry.

Automotive OEMs define digital transformation by placing high emphasis on data strategy and the customer ecosystem.

**“ Volkswagen Group defines its Digitalisation Unit on the basis of 5 basic pillars – which focus on digital customer experience and the Digital Company to deliver such experiences.**

By leveraging data analytics, Artificial Intelligence and related digital platforms, the Group intends to tie the customer seamlessly with the company's digital future. **”**

## IMPACT ON TALENT MANAGEMENT



Fast-paced digitisation will produce massive demand for experts in digital supply chains, e-commerce, digital manufacturing, data monetisation and digital aftermarket services.

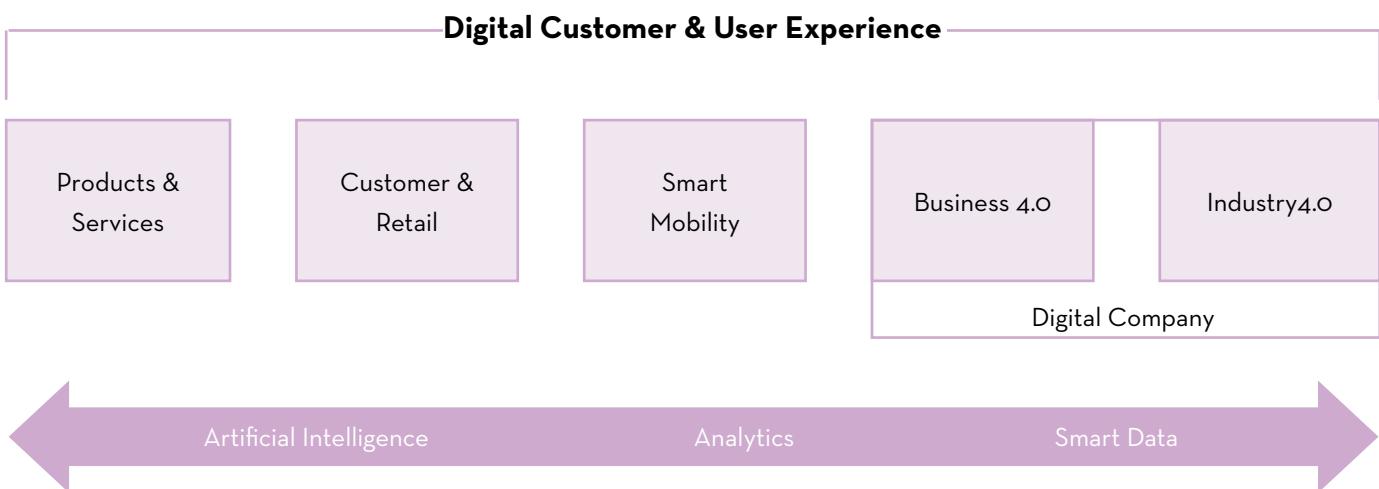
Digital tools will enhance the productivity and skill levels of existing employees, without the need to hire additional talent.

Global OEMs are also recognising the need to establish Innovation Labs focused on digital solutions development.

The growing emphasis on digitisation will, simultaneously, create the need for new digital KPIs that measure the performance and results of new, digitally-driven business models.

Meanwhile, the existing workforce will need to undergo a complete revamp and be familiarised with the latest technologies via digital training platforms.

## VW Group Digitisation Unit



## Trend 6: Industry 4.0 to Industry 5.0

The need for automation, robotics and Artificial Intelligence (AI) has sky rocketed due to the COVID-19 crisis. Spending by automotive companies on Industry 4.0 IoT is expected to increase from USD 15 billion in 2017 to USD 40 billion by 2025.

The path to industry 4.0 will be paved with investments in simulation modelling, cloud-based IoT platforms, cognitive manufacturing, on-line robotics, machine learning and contextual intelligence.

Industrial robots, requiring minimal maintenance, have been the key drivers in the adoption of robotic technologies across the automotive production value chain. The use of advanced data analytics and AI technologies in product design will forge deeper human-machine interactions in the pursuit of highly personalised products and services.

## IMPACT ON TALENT MANAGEMENT



Increased levels of human-machine interaction is shifting the focus towards highly skilled employees specialised in robotic development and maintenance.

Operating in such environments will require adequate training in machine programming, handling and maintenance.

The future digital and connected factory is set to disrupt existing supply chain networks, leading to a massive move towards digital skills acquisition.

During this transition period, workforce up-skilling, change management training, addressing employee anxieties over potential job losses due to increased automation, and transformational leadership will be key talent management areas on which to focus.

**Figure 11:** The Four Functional Facets of Industry 4.0 & the Connected Supply Chain

### Industry Convergence: IT-OT

The cross-pollination of ideas, technologies, and processes between the worlds of information technology and operations technology will form the crux of the fourth industrial revolution.

### Services 2.0

Exploring newer avenues for service innovations, such as cloud-based service platforms, and evaluating potential for new profit centres. Opportunity analysis for ICT technology in services.

### Supply Chain Evolution

The dawn of the future factory is set to disrupt existing supply chain networks. Digitalisation and increased connectivity are set to disrupt and realign existing value chain networks in the future.

### The Industry 4.0 Business Ecosystem

The advent of advanced ICT technologies will promote new inter-relationships and interdependencies, giving way to unexpected business collaborations and partnerships in the future.

## Trend 7: Shift to digital retailing

Global revenues from online vehicle sales and aftermarket parts and services are anticipated to grow from USD 120 billion to USD 650 billion by 2025. Sales of new vehicles are expected to contribute to 40% - 50% of global online revenues, creating an urgent need for online sales platforms. Connected dealerships seamlessly interact online with their customers, allowing them to buy a car online and receive contactless delivery of new vehicles. Digital tools are enabling personalisation of the customer experience, both online and offline.

To offset reduced footfalls in physical showrooms, most OEMs are turning to virtual showrooms and virtual user experiences as central elements of their sales strategies. Geo-fenced retail and offers will be tracked and managed by sales teams or outsourced to service providers, helping global vehicle brands achieve competitive differentiation. The entire shift of sales processes to digital platforms will require software engineers, developers and maintenance engineers to be included in the sales cycle, whereas service personnel will also need to be trained in optimising the use of online tools. Meanwhile, customer location services, including home test drives, will require vehicle dealers to hire more drivers.

“ OEMs resort to digital tools such as e-retailing apps, chatbots, FAQ directories and zero-contact garage to enable vehicle dealers to operate with minimal human intervention. ”

Contactless deliveries and processes will be designed to limit physical interactions, specifically on the logistics side of the business.

Grocery and food delivery providers such as *Postmates* and *DoorDash* have joined restaurant aggregators like *Grubhub* and *UBER Eats* in offering no contact, drop-off options – such as leaving groceries at the door and curbside pickup.

Services such as zero contact garage, offered by *Halfords* in the UK, are also emerging. In this case, car fittings and repairs are performed in the driveway or outside the customer's home, while the customer remains inside.

## IMPACT ON TALENT MANAGEMENT



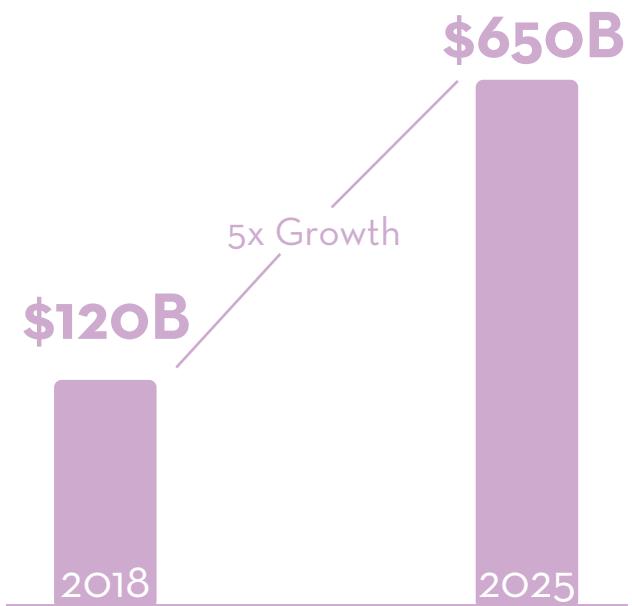
The shift to digital retailing will create the need for specialists across the digital value chain capable of harnessing the full potential of online platforms.

There will be high demand for IT and ICT experts who can design and manage virtual showroom experiences, social media experts, web configurators, and e-commerce platform developers.

OEMs will need to focus on developing more meaningful digital interactions with customers, and embed multiple customer touchpoints to influence their purchase decision.

The spotlight will be on social media marketers to generate the right kind of buzz on social media platforms, while data analysts will be required to analyse and distil information generated from electronic footprints.

**Figure 12:** Global Automotive Digital Retailing



## Trend 8: Road to Zero

A zero concept world is one informed by the vision of *Innovating to Zero*, involving zero emission vehicles, zero waste, zero accidents, zero defects, zero security breaches, zero carbon emissions (carbon neutral buildings and cities), and even zero diseases.

In turn, this vision will bring together more meaningful cross-industry collaboration and incorporate varied skill-sets, while altering the way the industry looks at product design.

For example, the *Vision Zero* strategy of *Continental Automotive Systems*, a leading automotive systems supplier, is powered by passive and active vehicle safety technologies that pre-empt accidents before they occur. Hence leading to zero accidents. *Volvo* and *Mercedes-Benz*'s holistic vision of zero car accidents brings together technology developers, infrastructure planners, and government / policy makers to enhance vehicle, road and driver safety.

**Innovating to Zero** in the automotive industry encompasses:

- Zero accidents
- Zero emissions
- Zero congestion

## IMPACT ON TALENT MANAGEMENT



The *Road to Zero* will highlight the need for new organisational roles with cross-functional capabilities, tasked with deepening productive linkages between engineers, infrastructure planners and governments across countries to push forward on zero emissions and zero accidents agendas.

From a R&D perspective, engineers with competencies in electronics and communication networks will be required to programme vehicles / sensors / external devices to ensure a safer driving environment.

Value optimisation through *Road to Zero* strategies is also expected to bring about change in the cultural mindset of the workforce. Being inherently effort-saving in nature, these strategies will enable organisations to be more sustainable by inculcating circular economies and endorsing Corporate Social Responsibility (CSR) on a wider scale.



## Trend 9: New business models

Mobility solutions providers and OEMs are embracing new business models and software platforms across their value chain in order to keep pace with dynamic technology-driven change.

Companies are licencing technology to design product solutions for EVs and AVs, developing new shared mobility assets and lighter business models, while building digital platforms to connect customers and stakeholders across the value chain. Today, the focus of every new business model is to play on partner strengths and create unique customer offerings.

**Daimler** and **BMW** signed a USD 1.13 billion mobility partnership to set up new business entities aimed at exploring futuristic solutions. These companies are unifying their services through five joint ventures: **Reach Now, Charge Now, Park Now, Free Now and Share Now**.

## IMPACT ON TALENT MANAGEMENT

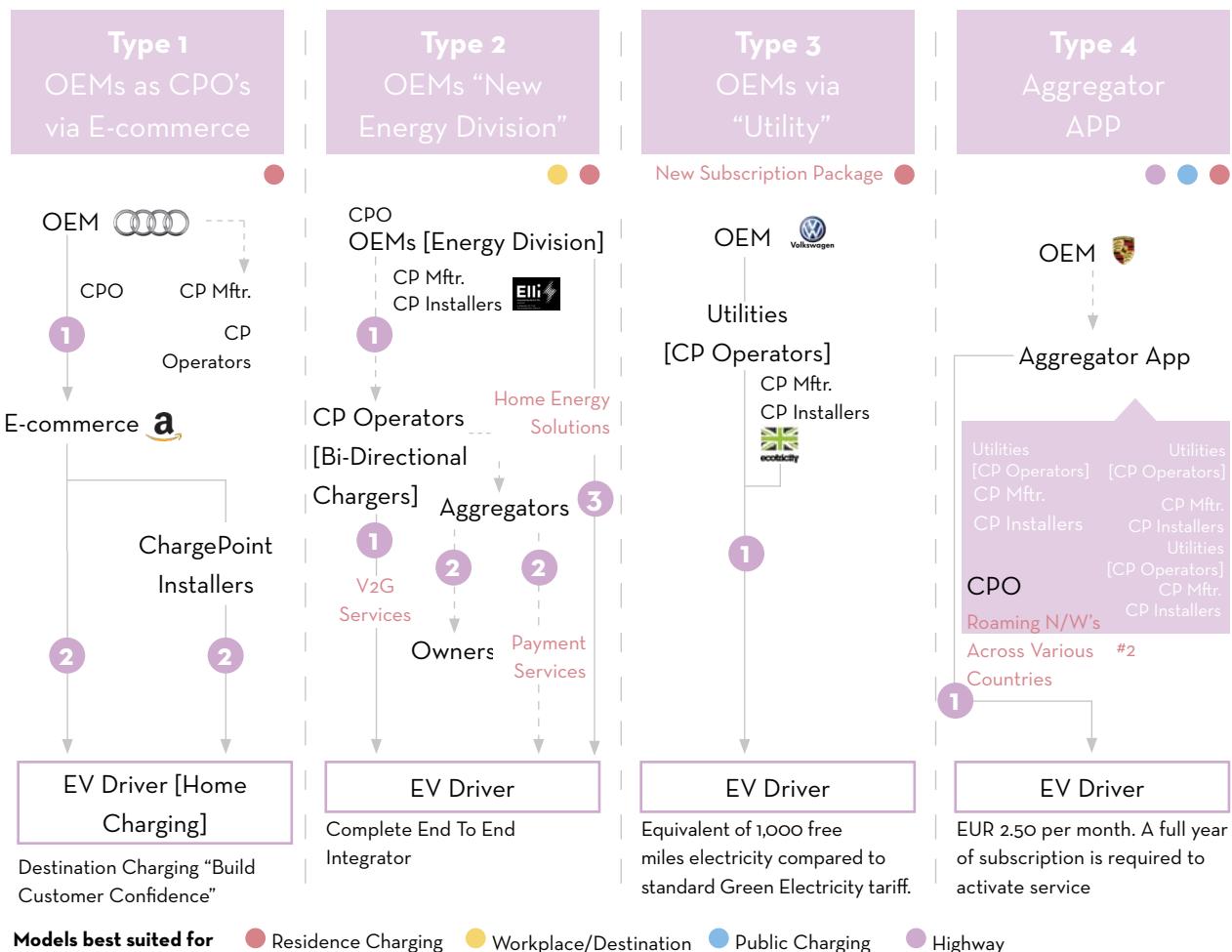


Such mergers and joint ventures will result in multiple layoffs and redeployment of resources. This will need to be efficiently managed by Talent Management teams.

As organisational requirements get updated and new roles emerge, career mobility and transitioning roles will become crucial areas of focus for most senior management professionals.

The effective handling of new roles and managing relationship dynamics will be pivotal to the success of new entities. The global nature of these companies will further underline the importance of cross-cultural training.

**Figure 14: OEM Business Model Types for Energy & Charging Eco System**



## Trend 10: Gen Zers as decision makers

As the global automotive industry marches towards a more digitalised future, Gen Zers (the population cohort born between 1993 and 2007) are emerging as key decision makers across the world, altering patterns in consumer use and behaviour.

Globally, about 34% of Gen Zers reside in Asia, and products targeting this demographic are expected to provide robust growth in all sectors. Gen Zers are digital natives, using more than five digitally connected devices on a daily basis.

“ Their basic vehicle preferences are distinct: more focused on form rather than function, more inclined towards green vehicles rather than gas guzzlers, greater preference for a high degree of in-vehicle functionalities, and more interested in software rather than hardware feature development. ”

## IMPACT ON TALENT MANAGEMENT



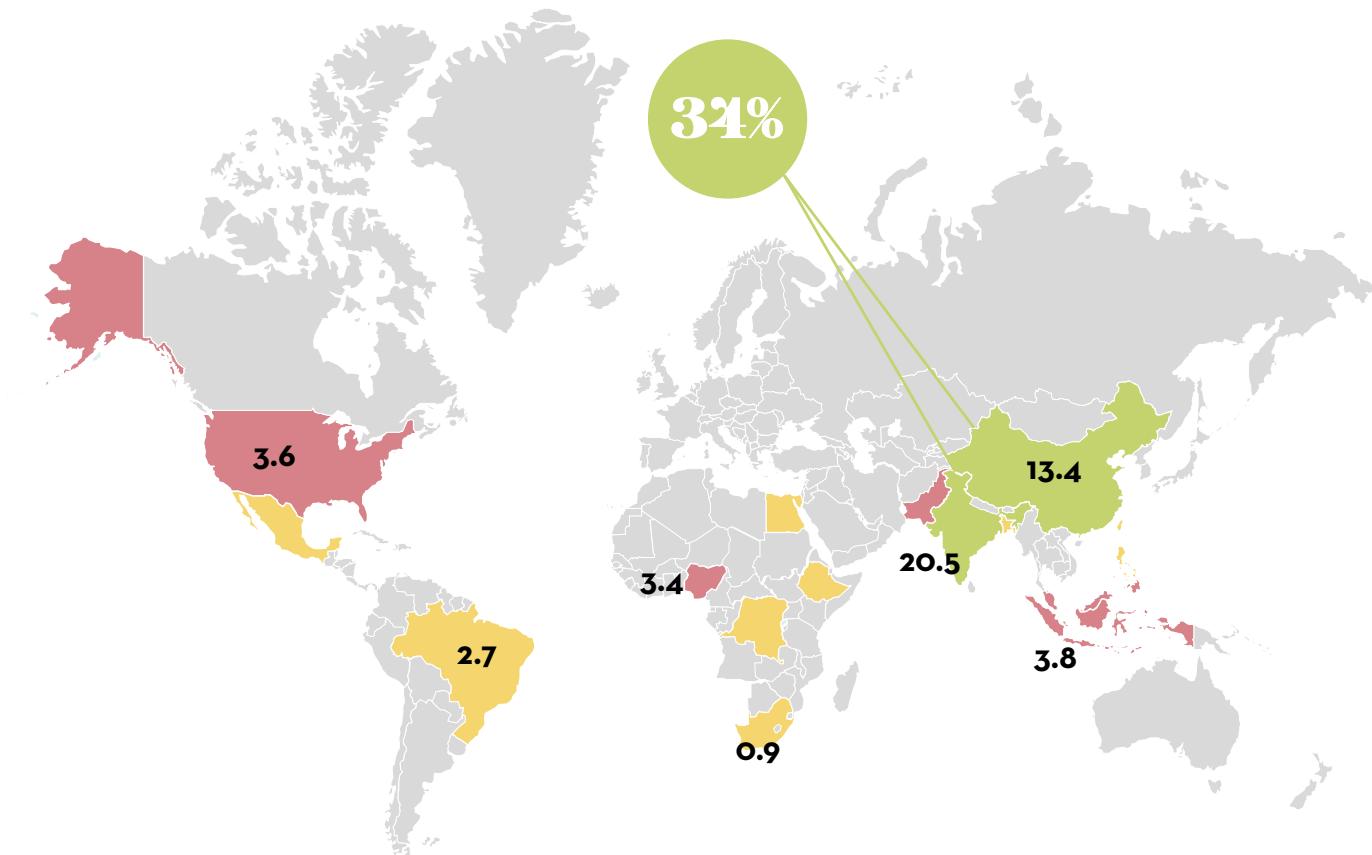
Attracting the Gen Z population cohort will involve nurturing younger talent able to analyse trends and translate them into design features. This will be accompanied by increasing emphasis on social media experts and media analysts.

Regarding workforce transformation, OEMs will need to encourage greater social, gender and racial diversity – especially in terms of managing core functions.

A globally dispersed workforce will need to be trained to follow common operational standards and nurture a cohesive, pan-organisational work culture.

Accordingly, the demand for cross-country training modules and on-boarding platforms is expected to rise in the future.

**Figure 15:** Gen Z Global Composition – 34% of the global Gen Z population is in India & China



# Conclusion

Massive technology-driven disruption, exacerbated by the COVID-19 pandemic, has accelerated the pace of transformation in automotive and mobility. As the industry moves to embrace new paradigms, it is becoming increasingly clear that building internal resilience and ensuring business continuity requires a deeper, more meaningful and holistic assessment of companies' talent strategies.

From highly skilled technical staffing, to fully outsourced strategic organisational support, and from re-training / up-skilling existing workforces, to evaluating future talent needs – leading automotive companies are turning to HR experts to future-proof their workforce and support the complete continuum of their talent and change management strategies.

## 1 Partner with talent experts

In dealing with a multitude of evolving work patterns in the Automotive and Mobility market, and as demands of workers increases in an interconnected 24/7 society, partnering with experts in workforce solutions is becoming an organisational imperative.

## 2 Capitalise on just-in-time talent

A widening demand-supply gap and the need for transdisciplinary skills are driving organisations to on-demand and flexible talent solutions in order to match products and services with customers' changing needs.

## 3 Drive innovation leadership through continuous learning

Future-proofing the company to accelerate the implementation of new ideas, fast-tracking innovation and bringing advanced products / services to market sooner requires constant need for up-skilling and re-skilling to keep pace with the latest advancements in the industry.

## 4 Prioritise tech & digital engineering skills

Intensifying digitalisation of automotive firms is placing increasing emphasis on transformation in the form of technical expertise, change management and continuous learning – bringing about a salient need for talent with a blend of technology and engineering skills to enhance the capacity, capability and innovation potential of organisations.

# Abbreviations

Abbreviation	Explanation
<b>APP</b>	Application / Platform
<b>BOOM</b>	Build, Own, Operate, Maintain
<b>CASE</b>	Connected Autonomous Shared Electric
<b>CoE</b>	Centre of Excellence
<b>COVID-19</b>	Novel Coronavirus that cause mild to severe respiratory illness, the outbreak of the virus has a growing impact on the people and economy from early 2020.
<b>CPO</b>	Charge Point Operators
<b>EV</b>	Electric Vehicle
<b>FAQ</b>	Frequently Asked Questions
<b>HR</b>	Human Resources
<b>ICT</b>	Information & Communication Technology
<b>IoT</b>	Internet of Things
<b>LiDAR</b>	Light imaging, Detecting and Ranging
<b>MaaS</b>	Mobility-as-a-Service
<b>OEM</b>	Original Equipment Manufacturer
<b>SOTA</b>	Software Over The Air
<b>vw. OS</b>	Volkswagen Operating System – Platform strategy for software development

# References

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